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# **Territorial politics and the multi-level party**

The literature on political parties has been affected by the national bias in party (system) research. However, the multilevel nature of party organizations deserves our attention because parties have responded as well as contributed to the rise in regional authority across most Western democracies. This article explores the organizational and programmatic responses of statewide parties to the challenge of multi-level politics. It concludes with a call for additional comparative data to test theories of party organization and party competition in multi-level systems and for stronger links between the multi-level party research agenda and the more traditional areas of party research on party democracy and legitimacy.

## **1. Introduction: From the National Party to the Multi-Level Party**

Regional authority has increased substantially in most OECD countries since World War II (HOOGHE, MARKS and SCHAKEL, 2010). In the EU, this process of decentralization has gone hand in hand with the pooling of sovereignty across a number of issues, from market regulation to economic and monetary union. Political parties have shaped and have been transformed by this process of territorial rescaling. Office-holders have to be elected across a range of territorial institutions (from the European parliament to a local council) and parties play a key role in the running of elections at all these levels. In such a multi-level environment, parties are not only brokers between the state and the citizens; they also provide a linkage between these levels, presenting voters with easily identifiable labels and with a degree of programmatic cohesion across the polity (DESCHOUWER, 2000: 14; FILIPPOV, ORDESHOOK and SHVETSOVA, 2004; CARTY, 2004).

Notwithstanding the multi-level nature of electoral and party competition, parties have been studied primarily at the national level. How parties select their leaders, draft programmes and are funded is best known for the *national* or *state* level. Likewise, we

have a much better understanding of the relationship between party office-holders and the party organization at the level of the state than at the local, regional or even supra-national levels. While focusing on the national level may make sense for studying parties in quite centralized states such as Norway, Portugal or Japan, it is more questionable in the case of multi-level states with directly elected sub-national assemblies, such as Canada, Germany, India, the US, Switzerland, Spain and the UK, to name just a few. Since regions provide meaningful arenas for political competition studying party organizational dynamics at that level makes sense in its own right. Furthermore, there is a methodological argument to support more rigorous analyses of sub-state politics (JEFFERY and WINCOTT, 2010). By shifting the unit of analysis to the region, the comparative method can be meaningfully applied to regional party systems and party organizations within the same state. Additional variables that may complicate the cross-national analysis of intra- and inter-party dynamics such as the effect of different electoral systems or of a presidential versus parliamentary system can be more easily controlled. Finally, even if the purpose is to understand *national* party politics alone, in multi-level states with a strong regional tier of government, this requires an awareness of the linkages between state and sub-state politics. The national party organization or profile may change in light of electoral, programmatic or organizational developments at the sub-state level.

The linkages between the state-wide and regional levels are most prominent for *statenide parties* (SWPs), which we see as multi-level parties *par excellence*. SWPs cover most of a state's territory, i.e., next to national elections they participate in the vast majority of regional (and local, possibly also European) elections. Therefore this article takes SWPs as its key unit of analysis. Our focus is on the relationship between the SWP national branch and its regional branches. As such, we do not analyze how SWPs may organize supra-nationally (for instance in the European parliament or as part of transnational party

federations), nor how they operate at the local level (on the former, see HIX and LORD, 1997). Limiting our analysis to central-regional dynamics within such SWPs allows us to focus on some of the key challenges these parties face. For general elections, they file candidates in all or most regions and must devise a single electoral programme that should appeal to as large a group of voters as possible. For regional elections, they need to take the specific interests of each region into account because the issues that are discussed at the regional level will often diverge from those that dominate general elections (FABRE *et al.* 2005: 37). This is especially the case in pluri-national states, such as Canada or Spain where SWPs face the competition of non-state wide parties (NSWPs) (DE WINTER and TÜRSAN, 1998; HEPBURN, 2009; MEGUID, 2008). Such NSWPs are different from SWPs in that they may have a limited territorial coverage (such as the SNP, Plaid Cymru, Catalan CiU, etc.) and/or a limited multi-level coverage (such as the Bloc Québécois, which only participates in Canadian federal elections within Quebec). NSWPs build their electoral appeal on regional identity, regional authority or territorial mobilization at the centre and are likely to question the 'regional' credentials of the SWPs. This tension between national and more particularistic regional campaigns may present a source of conflict for SWPs, as regional leaders may want to emphasise regional issues and adapt their programme to the regional context, while the party at the centre is more likely to prefer programmatic homogeneity. Put differently, vertical party organization is a potential conundrum for SWPs, which have to find an appropriate balance between party cohesion and regional demands for autonomy. How parties resolve this tension also has some bearing on the process of territorial rescaling of the state: the stronger the accommodation of territorially heterogeneous pressures the more likely authority will migrate away from the centre to the states.

This article has three sections. We first illustrate the relative ignorance of regional party politics in the conventional party organizational literature. We then point to

relatively recent efforts to integrate the vertical dimension of party organization and demonstrate their usefulness for the party and federalism/decentralization literatures. In the subsequent and core section of the article we point to four arenas in which more research is required. First, there is a need to engage with more rigorous processes of data-collection and analysis, and especially to combine quantitative analysis with qualitative research through mixed research methods. Second, recent analyses of SWPs have shown a clear bias to how parties organize ahead of elections (candidate selection, electoral campaigning), but have paid much less attention to how said parties formulate coherent policies and mediate or avoid policy conflict between levels. This is especially important for SWPs in office, since they are held responsible for most policies within a multi-level state, from high-level constitutional or fiscal territorial reform to less salient policies such as a building bridges or securing clean bathing water. Even such ‘regulatory or distributive policies’ can touch upon powers that in a multi-level state may stretch across various levels or affect multiple regions of the state. Third, more efforts must be made to provide a better insight into how multi-level relations within SWPs feed into or respond to shifts in regional authority within the state. In particular, we question CHHIBBER and KOLLMAN’s (2004) assumed causality between institutional reform, party systems and authority migration; by bringing in the role of SWPs we develop a more qualified understanding of the direction of this causality. Finally, the multi-levelled nature of SWPs may have implications for the state of party democracy more generally. Yet, as we will argue, the debates on party democracy have focused primarily on how parties operate at the statewide or grassroots level and much less so on how party democracy - or indeed, democracy more generally - are affected by the presence of a significant regional tier.

## 2. The regional ‘blind spot’ of party studies until the 1990s

The classic literature on political parties makes few references to how parties organize at the regional level (FILIPPOV, ORDESHOOK and SHVETSOVA, 2004: 178-9). Sure, single case studies of party organization in federal states such as Canada (SIMEON and ELKINS, 1980), Australia (SHARMAN, 1977; JAENSCH, 1983), Germany (LEHMBRUCH, 1976), or the US (JANDA, 1980) abound, but cross-national studies of regional party dynamics are rare (CHANDLER and CHANDLER, 1987 is a relatively ‘early’ exception)

Instead, most party scholars studied the relationship between the party centre and its elites on the one hand and the party members or grassroots on the other, or they addressed the rising power of parliamentary elites at the expense of other party groups (see for instance SCARROW, 2000 and SEYD and WHITELEY, 2004). In the past twenty years, party scholars have also focused intensively on the ‘crisis of modern party democracy’, but again mainly at the national level (MAIR, 2008). This crisis has manifested itself through dwindling membership figures, new competitors and the loss of a traditional ‘*classe gardée*’ in a context of increased electoral volatility (EPSTEIN, 1967; VON BEYME, 1985; LAWSON and MERKL, 1988; MAIR, 1997; DALTON and WATTENBERG, 2000)

Rokkan’s work emphasised centre-periphery dynamics, but a greater focus has been given to his analysis of functional cleavages (LIPSET and ROKKAN, 1967; ROKKAN and URWIN, 1983). The ‘freezing hypothesis’, which postulates that European party systems still reflect the dominant cleavages of the twenties, has become so central to the discipline that Rokkan’s contribution to territorial politics was ignored in favour of a national view of politics in which regionalism was often seen as an obsolete remnant of

politics before 'modernization' and national integration. The party system nationalization, that is, the homogenization of the territorial distribution of party support, was seen as the natural consequence of political modernization (CARAMANI, 2004; CHHIBBER and KOLLMAN, 2004; JONES and MAINWARING, 2003)

To be fair, classic party and federalism scholars have not totally ignored the relevance of sub-state party politics but their contributions were often flawed or built on false methodological premises. For DUVERGER (1976: 91) 'the political articulation [of political parties] tends to copy the administrative articulation of the state: the grouping of the 'basic elements' therefore looks like a pyramid with degrees, often coinciding with the official territorial divisions'. Duverger also briefly discussed the link between federalism and party organization and identified a potential paradox: because the organization of federal states accommodates regional particularisms and allows their expression at the central level, SWPs need not grant autonomous powers to their regional branches. On the other hand, when the distinct regional groups of a country cannot express their distinctiveness through a federal framework, then the accommodation of regional interests through the autonomy of regional party branches becomes necessary (DUVERGER, 1976: 109). In other words, SWPs may be most decentralized where the structure of the state is the least accommodative to regional concerns.

RIKER (1975: 137), on the other hand, reached the opposite conclusion. For him, 'when parties are somewhat decentralized, then federalism is only partially centralized. Because of this perfect correlation, [...] the inference is immediate: one can measure federalism by measuring parties. The structure of parties is thus a surrogate for the structure of the whole constitution'. Both authors reach such contradictory conclusions because they assume that *for the cases with which they are most familiar*, the organization of political parties reflects that of the state. For Riker (who is most familiar with the US parties and party system) the state-parties relationship is linearly positive: US parties are

internally decentralized, just as the US federal system is quite decentralized. For Duverger, who is more acquainted with continental European parties, the reality suggests otherwise. For instance, well into the 1950s, the centralized UK state coincided with a Conservative party which accorded significant autonomy and recognition to its Scottish branch. A deeper understanding of how to operationalize regional party branch autonomy combined with a larger sample of cases quickly shows that the autonomy of regional party branches can be variable within one and the same (regional) party system. Furthermore, the relatively centralized nature of the Spanish SWPs contrasts with the decentralized character of the state, just as the highly decentralized or bifurcated Belgian parties coincided with a unitary state until 1968. Put differently, the relationship between the territorial structure of SWPs and that of the state is more complex and unpredictable than Riker and Duverger assumed.

Occasional references to party politics below the level of the state are also found in ELDERSVELD's understanding of 'stratarchy' (1964: 9). Stratarchy is used as a concept to describe intra-party relations that are characterised by an important 'diffusion of power prerogatives and power exercise' and 'the existence of "strata commands", which operate with a varying, but considerable degree of, independence' (see also CARTY, 2004 and CARTY and CROSS, 2006). However, in these studies 'stratarchy' is mainly considered to capture the relationship between the central and *local* party organizations. KATZ and MAIR (1993, 1995) also consider 'stratarchy' as an important feature of the cartel party, but again, mainly to consider how local elites may be granted more autonomy from the central party (KATZ and MAIR, 1995: 21).

### **3. Thinking about parties as multi-level political organizations**

Since the mid 1990s, comparative party scholars have started to think much more about the regional dimension of party politics, just as federalism scholars have turned



increasingly to parties as key agents of territorial change. Recent publications have analyzed how SWPs adapt their organization and campaign strategies to their multi-level environment (SCHARPF, 1995; DESCHOUWER, 2003 and 2006; HOUGH and JEFFERY, 2003, 2006; VAN BIEZEN and HOPKIN, 2006; FABRE, 2008a; SWENDEN and MADDENS, 2009a and b; BRADBURY, 2006; HOPKIN and VAN HOUTEN, 2009; VAN HOUTEN, 2009; DETTERBECK, 2009; DETTERBECK and HEPBURN, 2010).

Arguably, it is in conceptualizing and operationalizing SWPs that party scholars (and in particular the work by Thorlakson, Deschouwer and Fabre) have done most to correct the ‘nationalist bias’ in party research. To operationalize authority relations in SWPs scholars have drawn primarily from indicators for measuring decentralization, regional government or federalism (WATTS, 2008; TRIESMAN, 2007; HOOGHE, MARKS and SCHAKEL, 2008). ELAZAR’s (1988) distinction between self-rule and shared rule provides a template for studying respectively the autonomy of regional branches and the degree of vertical integration of SWPs (DESCHOUWER, 2003, 2006; VAN BIEZEN and HOPKIN, 2006; THORLAKSON, 2006 and 2009; SWENDEN, 2006; FABRE 2008a and b; SWENDEN and MADDENS, 2009a; DETTERBECK and HEPBURN, 2010).

Self-rule expresses the degree of regional party branch autonomy. It refers to the ability of regional party branches to choose how to organize at the regional level, determine their own programme for regional elections, control candidate and leadership selection, raise resources and finance their own activities, collect membership fees and control their administrative staff. Regional branches may also be able to decide on their participation in regional government and on the choice of potential coalition partners. Shared rule (or what SMILEY (1980) refers to as vertical integration) refers to shared (as opposed to separate) membership of the statewide party as a whole and the integration

of regional branches in statewide party processes and organs. Shared rule measures the participation of the regional branches in the governance bodies (party executive, conference) and decision-making processes (selection of the statewide leadership and candidates for statewide elections, role in policy development and campaigning for statewide elections) of the statewide party.

In practice, SWPs display a strong variation in their central-regional relationship. We may think of SWPs with very high or very low levels of regional branch autonomy as well as statewide parties with very high or very low levels of vertical integration. Building on this distinction a two-by-two matrix can be built, featuring four ‘ideal types’ of SWPs, which DETTERBECK and HEPBURN (2010: 116) labelled as (1) *centrist* where SWPs combine low levels of regional party branch autonomy and vertical integration (2) *federalist* where SWPs combine low levels of regional party branch autonomy and high levels of vertical integration, (3) *modernist* where high levels of regional party branch autonomy are combined with high levels of vertical integration, and (4) *autonomist* where high levels of regional party branch autonomy are combined with low levels of vertical integration.

Much of the literature in the past fifteen years has sought to fit SWPs across a number of multi-level states into these four categories and especially to explain why they got there and how and why they transformed their organizational template across time. By and large, these studies show that SWPs within the same multi-level state or even within the same region do not necessarily adopt a similar organizational structure, notwithstanding the similarity of the institutional context in which they may operate.

Based on evidence primarily from parties in Western Europe, four types of factors have been proposed to explain multi-level party organization: (1) *systemic* features such as the type of federalism, electoral rules and laws; (2) the nature of statewide and regional party competition, especially the degree to which the party system is nationalized, which

in turn can be related to the structure of underlying *sociological cleavages*; (3) *political factors* such as the incumbency status of the statewide and regional branches; and finally, (4) *internal party features* such as the institutionalization of the party's organization, party ideology, the presence of powerful figures at the regional level and the party's general attitude towards decentralization of power, both within the party organization and within the state (DEITTERBECK and RENZSCH, 2003; DESCHOUWER, 2003; FABRE, 2008a; HOPKIN, 2003; SCHARPF, 1995; SWENDEN and MADDENS, 2009a; THORLAKSON, 2009).

With respect to systemic factors, scholars expected the type of regionalization or federalism to influence the vertical organization of SWPs (among others, SWENDEN, 2006 and RENZSCH, 2001). Dual federalism, which features a clear separation of competence between levels of government, is expected to increase the likelihood of regional branch autonomy and to generate a *de facto* separation between the statewide and regional branches. In contrast, integrative or cooperative federalism is expected to contribute to a more integrated organization with limited regional branch autonomy and a stronger presence of regional branches in central party organs (SCHARPF, 1995; CHANDLER and CHANDLER, 1987: 98-9; CHANDLER, 1988: 157-9; FABRE, 2008a: 310). In addition, institutional asymmetry (cases where not all regions have identical powers) could also lead to organizational asymmetry, with party branches in more powerful sub-state entities receiving more autonomy from the central party (DESCHOUWER, 2000: 16; FABRE, 2008a: 311).

Empirical studies have shown mixed results with respect to these hypotheses. In general, they work better to explain variations in regional branch autonomy than in variations in degree of integration. Using the centralization of state resources as a proxy for the centralization of competencies in seven federal states, THORLAKSON (2009: 169-71) finds a negative correlation between the level of state resources and autonomy

from central party influence. She also observes that in dual federations SWPs give more autonomy to their party branches than in cooperative federations. HEPBURN and DETTERBECK (2010: 124) confirm this conclusion. They show that SWPs in Austria and Germany, two cooperative federations, tend to be more integrative, with a stronger voice for the *Land* parties at the centre. Although these findings are in line with the expectations, German regional party branches tend to be more autonomous than anticipated. Arguably, without a minimum level of autonomy the German regional branches might not have been able to capture the degree of shared rule which they presently enjoy (SWENDEN and MADDENS, 2009b: 256). Overall, THORLAKSON (2009: 171) concludes that institutional factors do not account for the level of influence of the sub-state parties on the central party and their integration into central party organs. Comparing party organization in Spain and Britain, FABRE (2008a) finds that the distribution of competencies only moderately correlates with SWP organization. In addition, she finds that the organizational asymmetry that may be found in some of the SWPs is not related to the institutional asymmetry between sub-state governments in either country.

Next to exploring the correlation between patterns of regional authority and statewide party organization, another set of ‘systemic’ hypotheses looks at the effect of electoral laws on party organization, in particular, the timing of regional elections in relation to statewide elections (HOUGH and JEFFERY, 2006; DESCHOUWER, 2006). Where one or several regional elections are held nearer to a statewide election, central party branches may feel more inclined to constrain the level of regional branch autonomy, since the election results may be interpreted as a popularity test for the central government. Similarly, the statewide party can be expected to interfere more in regional campaigns when general and regional elections coincide, or when most or all regions organize their elections at the same time (as for instance is the case for regional elections

in France, the ordinary regions in Italy, the non-historic communities in Spain and the Belgian regions).

The nature of party competition is another important variable which affects how SWPs are organized. Two aspects are particularly relevant: the nationalization of the party system and the degree to which regional party systems are distinctive, for instance because of the presence of strong NSWPs. In turn, the nationalization of a party system and the congruence between regional party systems are related to the sociological cleavages in the state (DESCHOUWER, 2006: 296-98). Notwithstanding Caramani's exclusive focus on general elections results, he observed that in some states (Belgium, Spain) centre-periphery cleavages had remained strong and therefore limited the nationalization of party politics (CARAMANI, 2005: 315). In those states where the nationalization of the party system is strong, that is, where voting patterns tend to be homogeneous across the state, SWPs are expected to remain quite integrated, as the central party will find it easier to keep the regional branches in tune and less necessary to tolerate regional divergence in party policy to secure electoral popularity at the regional level. On the other hand, where the national party system is weakly nationalized and/or where regional party systems are highly distinctive, the balance of power is expected to shift away from the centre to enable regional party branches to adapt their strategies to regionally specific circumstances (HOPKIN, 2003: 230).

RENZSCH (2001: 24) argues that the divergence between federal and provincial party systems has contributed to the bifurcation of Canada's federal parties. 'Bifurcation' here refers to the fact that the provincial and federal parties of the same name are in fact separate parties. Provincial parties, sometimes under the pressure of provincial legislation, chose to separate from the federal party in order to gain more decisional autonomy and distance themselves from the potential lack of popularity of the federal party (RENZSCH, 2001: 7-8). DETTERBECK and HEPBURN (2010) argue that a

similar process is currently underway in Scotland, where the regional branches of the Labour, Liberal Democrats and Conservative parties are increasingly pressured into a more autonomist direction as result of the competition of a nationalist challenger, the SNP. In contrast, since German patterns of electoral competition at the *Land* level remain influenced by federal issues, German SWPs have remained more integrated (DEITTERBECK and JEFFERY, 2009: 84-5).

Contextual factors, such as whether the party holds office at the central or regional level also influences the relation between the statewide and regional party branches. Evidence from Spain suggests that regional leaders manage to increase their decisional autonomy when they control regional governments and when the central party leadership is in opposition. The same observation holds for Germany, where regional party leaders in government are members of the federal second chambers and are *de iure* members of the federal party executive (LEHMBRUCH, 1998, SWENDEN, 2010). Conversely, the central party is more likely to exert control over its regional branches when it is in office in Madrid (FABRE and MÉNDEZ-LAGO, 2009; FABRE, 2008a; ROLLER and VAN HOUTEN, 2003). HOPKIN (2009b) also concludes that Italian regional leaders gain more autonomy once they reach regional office, while evidence from the UK suggests that holding regional office is not enough to gain more autonomy when the central party leadership is also in power (FABRE, 2008a).

Finally, intra-party factors are expected to act as filters between the vertical organization of the parties and their environment, either enabling the devolution of power to sub-state party branches or on the contrary countering structural pressures to maintain the existing balance of power within the party (HOPKIN and BRADBURY, 2006: 136). Structural factors are therefore expected to affect parties differently depending on their ideological traditions and party family, pre-existing organizational practices and leadership strength (FABRE, 2008a: 312). HOPKIN (2009a) also supports

the view that ‘party-centred’ accounts of the dynamics of multilevel party organization provide a better understanding of how parties manage centre-periphery relations. Comparing the British Labour party and the Spanish PSOE, he shows that organizational inertia, that is, the parties’ resistance to change their organization in a changing environment, should not be underestimated (HOPKIN 2009a: 196).

On the role of party ideology, HEPBURN and DETTERBECK (2010: 123) find that in Spain, Italy and the UK, centre-left parties tend to grant their regional branches more autonomy than centre-right parties. SWENDEN and MADDENS (2009b: 262-63) observe a correlation between a party’s preference with respect to the territorial organization of the state and its own organization. For instance, the ‘devolved’ but not federal structure of the Labour Party in the UK is consistent with that party’s support for devolution, but not federalism; unlike the Liberal Democrats whose federal structure corresponds with their endorsement of a federal state structure. The same observation holds for the highly centralized Italian Communists (who opposed devolution) in contrast with the more decentralized organization of the Spanish Communists (who support federalism).

Finally, organizational traditions appear to have a lasting impact on the organization of SWPs. For instance, the asymmetry between the Scottish Conservatives and the Welsh Conservatives is the direct result of different patterns of party formation, as is the asymmetry between the Catalan socialists of the PSC and the ordinary branches of the PSOE (FABRE, 2008a).

### **3. The way forward in territorial party politics research**

#### ***3.1 Data collection: for a more systematic approach to data collection***

Explanations that tie changes (or lack thereof) in party strategies to the ideological and organizational legacy of political parties require a good overview of the parties' history, ideological trajectory and organizational development across multiple arenas and across time. These information may be extracted from party statutes (party organization), party manifestos (policy positions and salience), party documents (conference speeches) and coalition agreements. Scholars have begun to study regional party manifestos (LIBBRECHT et. al., 2009; DEBUS, 2008) and coalition agreements to measure organizational or policy strategies or to test coalition theories in multi-level settings (see for instance DOWNS, 1998; KROPP and STURM, 1999; ŞTEFURIUC, 2009a and b; ORTE and WILSON, 2009).

The research on multi-level party politics that was published in the last fifteen years is the product of intensive data collection on multi-level party organization for a number of cases, most prominently the UK and Spain, but also Germany and Canada (HOPKIN and BRADBURY, 2006; FABRE, 2008a; FABRE and MÉNDEZ-LAGO, 2009; DETTERBECK and JEFFERY, 2009). However, data is not always collected in such a way as to make it comparable, and existing data often fail to differentiate between the different regional branches. Therefore, while the data provides a good description of the vertical integration of the parties, it tends to make more general statements about the level of autonomy that regional party branches enjoy (see for instance THORLAKSON, 2009). This is problematic because it brushes off differences between regional branches and only registers the most salient examples of asymmetry (for instance in the case of the Catalan PSC and the Bavarian CSU). This dearth of regional data means that we are unable to compare party organization at the regional level and cannot test the impact of regional institutional and electoral factors on multilevel party organization. FABRE (2008b and forthcoming) has developed a framework to code party organization at the statewide and regional levels and to provide systematic comparable data, but this type of



data is very time-consuming to gather. In addition, because this research agenda is relatively new it is difficult to evaluate how parties change over time because we have limited longitudinal data. Moreover, crucial data on multilevel party finance is still largely missing, in part because of its highly sensitive nature.

Gathering data on party organization across levels can be a very time-consuming endeavour if the researcher interviews party officials and staff members at both the statewide level and in the regions. This is the most common strategy, but for obvious practical and financial reasons, it can only produce data for a limited number of SWPs. Thorlakson's strategy was to send questionnaires to regional party chairmen or presidents and carry out a series of complementary interviews. This methodology allowed her to gather a wider range of data on party organization across an unprecedented number of countries (THORLAKSON, 2009). Her methodology is not without limitations, however. In particular, her range of sources is quite limited. She relied entirely on information provided by sub-national party chairmen, leaving aside other party office-holders and federal-level party officers and officials.

Going forward, if a resource-sensitive method of comparative data collection is to be designed, it should be based on Thorlakson's research strategy and gather a mix of qualitative and quantitative data. Questionnaires should be sent to a larger range of party actors, including state-wide as well as regional party actors with a range of experiences: party chairmen but also chairs of candidate selection committees, party officials in charge of elaborating the party manifestos and organising party campaigns, etc. Because researchers also look for cases of intra-party conflict, about which party officials may not be forthcoming, experts, mostly academics in the different countries and regions, should also be polled. In some cases, additional data may be sought from highly experienced journalists, retired party officials or even party dissidents, who may be able to sketch a more detached (if not necessarily objective) picture of authority relations within statewide

parties. This last group would add an external perspective on multi-level politics and multi-level party dynamics. Finally, researchers should aim at gathering qualitative data through open ended questions about party processes and quantitative data, based for instance on FABRE's coding scheme (2008b; forthcoming). The latter facilitates the comparison between political parties and between different party branches. It will also help constitute a database, which, after a number of iterations, will help us evaluate and explain party change.

Explanations that are specifically tied to the electoral ambitions of SWPs require longitudinal and comprehensive electoral results for general and regional elections. Explanations that link strategies of statewide parties to their office- or policy-seeking ambitions require a more careful analysis of their policy programmes, and in order to map eventual government participation, an overview of the composition of governments at the national and regional levels over time. Efforts are currently underway to use different methodologies to extract party positions from regional manifestos. VOLKENS et al. (2009) adapted the Comparative Manifesto Project methodology to the study of party manifestos at the sub-state level and added two positional codes: one on identity claims and the other on authority claims (see ALONSO and GÓMEZ, 2010). MADDENS and LIBBRECHT (2009) and LIBBRECHT et al. (2009) also measured identity and authority claims across a range of Spanish and UK general and regional election manifestos and coded them on position and salience. This methodology has generated a wide range of information on the salience (and, in the case of Libbrecht, also position) that SWPs attribute to regional identity and autonomy. However there is a major caveat to this method: it is extremely time-consuming to code party manifestos, and the number of manifestos for regional elections makes the task of gathering comparative data across countries a daunting undertaking. For this reason, DEBUS and MÜLLER (2010) used a computer-assisted method of content analysis (also see DEBUS

et al., in this volume). Using the software Wordscore, they were able to extract the policy positions of parties in nine countries. Even though this method does not allow researchers to obtain the same level of detailed information as LIBBRECHT's (2009) or VOLKENS et al.'s (2009) methods, it enables a faster collection of data across a larger number of cases. As a result, the choice of method of analysis represents a trade-off between detailed information on party positions on the one hand, and time- and resource-efficiency on the other. For large-scale comparative analysis, the methodology of the Comparative Manifesto project is too time-consuming and expensive, but researchers are bound to have a more limited understanding of the details of party positions with automated methods of content analysis.

Compiling information on the composition of central and regional governments across time may seem an easy task, and it is for instance well documented in the cases of Germany, where regional government composition has important policy implications at the national level through the functioning of the *Bundesrat*. However, it is surprising how difficult it is to find that information for cases like Italy, France or even Spain, let alone India.<sup>i</sup> This task remains to be undertaken, and it is necessary given the strong incumbency effect on multi-level party dynamics highlighted above.

Finally, researchers can rely on the comprehensive database on regional authority compiled by HOOGHE, MARKS and SCHAKEL (2008) to evaluate the merits of explanations that relate the organization and strategies of statewide parties to variations in the degree of self- or shared rule in the state.

### ***3.2. Multi-Level Parties and Policy Coordination***

Thus far, multi-level parties have been studied primarily as organizations that organize and campaign for elections. Few studies analyze processes of intra-party coordination

and decision-making on policies between elections (LEHMBRUCH, 1998; LAFFIN, SHAW and TAYLOR, 2007; VAN HOUTEN, 2009 for exceptions). Yet, one, if not the key *raison d'être* of most parties is to make or influence policy by gaining executive office (MÜLLER and STRØM, 1999). Conversely, parties in opposition derive legitimacy from taking position against or amend policies that government parties propose, or from pushing through their policy preferences instead. While we have a good understanding of parties as organizations that campaign and recruit members, more work needs to be done to link such findings to how parties shape policy and manage policy conflicts when in government or in opposition. VAN HOUTEN (2009), for instance, makes a case to study the authority of SWPs during 'extra-ordinary' times, that is, in periods when the levels are at loggerheads about highly salient and politicized issues. Where the central and regional branches are in conflict over permissible coalition strategies or party policy, it becomes possible to 'distinguish between a regional party branch with autonomy because the national party allows it and a regional branch which has autonomy because the national party no longer controls it' (VAN HOUTEN, 2009: 148). Below, we focus on two types of contentious issues: the extent to which regional branches are allowed to chose coalition partners of their choice and the degree to which regional branches are allowed to develop their own policies (with or without coalition partners).

SWPs, however decentralized they may be, may seek to coordinate their coalition strategies across levels and across regions to prevent conflicting messages, which could be exploited by competitors or could alienate voters who expect consistency (ŞTEFURIUC, 2009b: 101). For instance, ŞTEFURIUC (2009b: 109-12) shows that in Spain, statewide and regionalist parties have negotiated reciprocal agreements of government support across levels. In the mid 1990s, the Catalan regionalist party CiU offered its support to the Conservative PP minority government in Madrid and in return received the support of the PP to support its minority government in Catalonia

(STEFURIUC, 2009b: 110). More recently, in 2007, the central leadership of the PSOE prevented its regional branch in Navarre from forming a coalition with left-wing-green Izquierda Unida and the left-wing Basque nationalists of Na-Bai, forcing Navarre Socialists to support the minority government of the UPN, which supports the PSOE minority government in Madrid. In a context of multi-level coalitions, SWENDEN (2002) showed that Belgian parties, notwithstanding their non-state-wide character, tended to prefer the formation of congruent coalitions across levels, with the same parties holding power at the federal and regional levels. The more widespread occurrence of incongruence since the decoupling of federal and regional elections in 2004 set the tone for less harmonious federal-regional relationships, and at least in Flanders has contributed to a radicalization of demands for territorial reform (DESCHOUWER, 2009).

Congruence may be a very important tool for policy coordination, but it is not necessarily the preferred option of regional party branches, as incongruence may give them some leeway to diverge from policies that are preferred by the central branch, especially when the latter holds office at the centre. For instance, the Scottish Labour party agreed to provide free care for the elderly or free education for 'home' students under pressure from their Liberal Democrats coalition partners. One could question the ability of Scottish Labour to push through these policies – which diverged from Labour's policy in central government– had they not been in coalition with the Lib Dems.

Policy coordination between levels or party branches is not only required during the process of regional government formation and for the conclusion of coalition agreements. It may also be required where SWPs hold office at multiple levels, especially on policy issues of mutual concern or on issues that touch the ideological core of the party (such as welfare for social-democratic parties). Analytical frames and tools for understanding how and why SWPs coordinate cannot be derived from the federalism

literature per se. The policy literature or scholarship on intergovernmental relations is more suited to this task (see for instance BOLLEYER, 2009). To what extent is policy coordination within SWPs formalized or institutionalized? Is intra-party divergence on policy a sign of toleration or the result of a failure to coordinate? To what extent is congruence in party policy across levels or between branches of a SWP the outcome of spontaneous vertical and/or inter-regional coordination or of hierarchical control by the central party branch? To answer such questions, we need to consider the different power resources that are available to party actors. While power resources do not explain why parties coordinate in a specific way, they show how the different coordination mechanisms (hierarchy, bargaining, non-coordination) operate within parties.

Focusing on policy coordination (and divergence) within SWPs also tells us something about how policies may diffuse vertically (from the centre to the regions but also the other way round) or horizontally (from one region to another). In other words, challenging methodological nationalism, this approach could show how central party policy may be as much the outcome of intra-party bargaining or policy experimentation at the sub-state level as of decisions by central party alone. Analyzing processes and outputs of intra-party bargaining requires content analysis of party documents and semi-structured interviews with party officials. Using process-tracing techniques the outcome of decisions on policy as adopted through legislation by a party branch in office could be compared with the initial policy preferences associated with that branch as stated in party documents, speeches at the party conference or the party manifestos at an earlier point in time.

### ***3.3. Multi-Level Parties as the link between regional authority and the multi-level party system***

CHHIBBER and KOLLMAN's (2004) comparative study on party systems in the US, Canada, India and the UK assumed a causal link between the nationalization of the party system and authority migration (i.e. the strengthening or weakening of regional authority). Party systems become more nationalized as governments centralize authority; in contrast, there are more opportunities for regional, state or provincial parties to thrive as provincial or state governments gain more authority relative to the national government (CHHIBBER and KOLLMAN, 2004: 21). Chhibber and Kollman argue that the nationalization of the US and Indian party systems can be attributed to the effect of large historical junctures, such as both World Wars, the Great Depression and the birth of the welfare state. We see two major problems with this argument and how it is construed.

The first problem is that both authors do not take into consideration regional election results for measuring the nationalization of party systems. Yet, if the purpose is to test the relationship between authority migration and the nationalization or de-nationalization of party systems, the outcome of regional elections cannot be overlooked. We can briefly illustrate this with reference to ongoing debates in the UK with respect to strengthening the Scottish level of self-rule. If one were to focus on UK general election results alone, it would be much harder to explain why in 2009 all the Scottish branches of the UK 'unionist' parties agreed to request more (fiscal) powers for the Scottish Parliament. The SWPs did not suffer significant losses in the 2005 and 2010 general elections. In 2010 Scottish Labour even bucked the statewide trend by increasing its vote share compared with 2005. Understanding why the issue of Scottish autonomy has become more salient requires us to look at the outcome of the 2007 Scottish parliamentary elections. These produced 'change' in the Scottish party system by catapulting the Scottish National Party into power (albeit it as a minority government). The SNP's rise to power altered the nature of party competition in Scotland and made regional authority a key issue on which both the government and opposition parties

mobilized. While still defending the union with England and Wales, the SWPs have shifted closer to the position of the SNP by endorsing the need for territorial constitutional reform, something the Scottish Labour Party did not favour before 2007. The Scottish branches of the three unionist parties ‘persuaded’ their central party to take their recommendations for strengthening Scottish autonomy seriously, and the UK Conservative-Liberal coalition government confirmed its intent to introduce legislation in 2011 to that effect.

The second problem relates to the proposed direction of causality in Chhibber and Kollman’s argument. Authority migration steers (de)nationalization, and not the other way round. Even if we retain a focus on national election results alone, it is clear that the direction of causality may have run in the opposite direction in some cases. For instance, in Belgium, the parties split before the country even started to decentralize powers to Regions and Communities (VERLEDEN 2009). The assumed direction of causality is even more strongly falsified if we move away from a top-down approach to authority migration, which is based exclusively on how parties perform in national elections. Indeed, should, as expected, the UK government introduce legislation in 2011 to strengthen the level of Scottish self-rule, it would do so in response to changes in the Scottish party system (and the concerns raised by the Scottish statewide branches) and not the other way round. Similar observations may apply to processes of authority migration in Spain or India, which often followed from important developments in the multi-level party system. The most recent reform of autonomy statutes in Spain illustrates that regional political developments (the PSC-led left-wing nationalist coalition in Catalonia) have important implications for centre-periphery dynamics in that country as the Spanish Socialist government had no choice but to formulate a relatively accommodating response to satisfy the Catalan desire for more self-rule. This, in turn, had a snowball effect on the autonomist demands by several of the other autonomous



communities (ORTE and WILSON, 2009; KEATING and WILSON, 2009). Finally, in India, the strengthening of political federalism in the wake of the economic liberalization policies since the early 1990s took place under broad-based Congress- or BJP-led coalitions in which regionalist parties played a pivotal role. However, the breakdown of Congress-led governments at the sub-national or state level had already started in the late 1960s and it took some time for these developments to register at the level of the national party system (SAÉZ, 2002).

CHHIBBER and KOLLMAN (2004) do not systematically explore the role that parties, especially statewide parties play as drivers of party system change and territorial reform. As the various examples above illustrate, authority migration is often mediated through the strategic choices that parties (especially statewide parties) make, and these choices are often informed by policy or electoral challenges that arise at the national and sub-national levels. This is the case notwithstanding the need for territorial reforms to be enacted by federal or central parliaments alone, albeit sometimes in conjunction with regional parliaments or a referendum (TOUBEAU 2011).

There is scope for researchers to explore the parties-party-system-authority migration nexus more systematically. How durable are (de)nationalizing tendencies in multi-level party systems and how do they connect with the organizational and campaign strategies of statewide parties and with processes of (de)centralization? There is a natural tendency to assume that where regionalist parties push a party system into denationalization, SWPs will accommodate the centrifugal pressures in the party system by decentralizing their own party organization and by endorsing constitutional change that strengthens the regions. Yet, as we have argued, not all SWPs respond in the same way. Furthermore, SWPs that decentralize their organization and – if in office – also the state may spark a re-centralization of the party system, insofar as they have successfully accommodated the issues that regional party challengers stand for, or at least temporarily halted or even

curbed the electoral success of NSWPs. In other words nationalized party systems could coincide with a rather decentralized state structure if the SWPs are internally highly decentralized (the US party system is a case in point).

### ***3.4. Multi-Level Parties and Democracy***

In recent times, some scholars have questioned the role that parties still play in safeguarding democracy (MAIR 2008). Accused of being remote from citizens, of lacking social roots and of blurring the lines of the political debate by converging towards the centre, political parties are said to be in crisis. This crisis of trust is reflected in declining levels of party identification among citizens, higher levels of electoral volatility, declining voter turnout and declining party membership (DALTON and WATTENBERG, 2000; MAIR and VAN BIEZEN, 2001). This crisis of party democracy is analyzed with reference to party membership at the state level or by considering voter turnout and patterns of electoral volatility following general elections. However, the national level is not the only relevant level of political action. In a context of increasing regionalization and federalization in Western Europe, regional governments have become important policy actors and regional political parties play a crucial role in these political systems, selecting regional leaders and candidates, developing policy proposals and participating in regional governments. For SWPs, the ‘professionalization’ of the regional political class may provide regional party branches with an important role to rebuild their image and increase their membership.

At the national level, attempts to bring in more members have involved direct membership votes for leadership and candidate selection and the creation of forums to debate party policy. Research is needed to evaluate the contribution of the regional party branches to tackling this problem of membership decline and to addressing the issue of

membership participation. Do regional party branches experiment in searching new ways of reconnecting with citizens, and do other parties or party branches learn from this? Such research could investigate whether the regional branches of SWPs have made efforts to increase party membership and what sort of incentives, if any, they have created to increase participation. It remains an open question whether in multi-level states, the addition of an extra layer in which parties organize and campaign has benefited the quality of party democracy. Answering it would require us to bring together data on the organization of political parties in multilevel systems and address more classic and long-standing questions about democracy within political parties, two branches of the political science and party literatures that so far have worked in relative isolation from each other.

We could envisage several scenarios with regard to membership involvement at the regional level: the presence of regional party branches with their own leaders, candidates for public office and policies may create additional opportunities for members to influence the strategy of the party overall. Since participation in political parties is a time-consuming effort for ordinary members, party members may choose to participate at one level rather than at another, often depending on which level they consider to be the most important. However, regional party branches may simply offer an opportunity to regional-level elites to decide who leads regional branches and which policies they should adopt while party members continue to be used as ‘warm bodies’ (MAIR, 1994: 14) with little influence on its decisions. By using regional party branches of SWPs to test various theories of party change and to evaluate different models of party organization, other contextual variables (such as differences in the electoral system) that would appear in cross-national comparisons can be more easily controlled for. In other words, it would become easier to establish the effect of party (organizational) change on the state of party democracy.

This particular research agenda could link multilevel party research with some of the big questions of party scholarship on the role of party members and democracy within political parties and on the link between parties and society. These questions are also related to the issue of the roles political parties still play in contemporary democracies. Do the organization and the actions of political parties at the regional level contribute to increasing the quality of democracy, not only at the regional level but also for the state as a whole?

#### **4. Conclusion**

In this article, we have taken stock of the key developments and remaining challenges in the study of parties as multi-level parties. We focused primarily on statewide parties in multi-level states since they come closest to the ideal type of the multi-level party by being active in most or all regions of a state and by participating in statewide and regional elections.

For long, party scholars neglected the regional dimension of party politics and were preoccupied with how parties organized, campaigned and wooed voters in national elections alone. Conversely, scholars of territorial politics focused on processes of constitutional territorial reform, the institutional dynamics of multi-level government and intergovernmental relations. In the past two decades, both fields have grown closer to each other. At present, multi-level politics has firmly entered the realm of party and electoral scholarship.

However, much remains to be done in the field of territorial party politics. Possibly due to the large collection of data that is required, scholarship on multi-level parties is less advanced than that on multi-level party systems or electoral behaviour. The complexity of data collection and the need to supplement quantitative with qualitative

methods can partially account for this. Scholars of multi-level party politics not just require only electoral data (results, voter turnout) for each region or each regional election, but they must gather data on party organization, campaigning, and policy for each party within each 'sub-system' of the multi-level party system, since the degree of organizational autonomy can vary from one regional party branch to another. Only when this information are gathered and measured in a comparable way across a large number of cases can we start drawing a more comprehensive picture of how multi-level parties interact with the party system and with authority migration. Only then will we be able to address why some multi-level parties cope much better with territorial rescaling while others struggle to survive.

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<sup>i</sup> A notable exception is Josep M<sup>a</sup> Reniu's website on coalitions, which covers the period 1980-2004 <http://www.ub.edu/grepa/Datosydocs.htm>.